

**To:** Prospective Offerors

**From:** Christopher G. Staff, Contracting Officer

**Date:** May 3, 2021

**Subject:** Questions & Answers #2 for Solicitation No. 19BH2021Q0004 for Actuarial Services

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**Q.1) Please provide Statement of Assets; Defined Benefit Pension Plan Policy.**

**Ans:** The following documents will be provided to the Contract Awardee after contract award:

- a) Statement of Assets for Policy Year Ending May 31, 2020
- b) Statement of Assets for Policy Year Ending May 31, 2021 (if made available in time by the pension company)
- c) Defined Benefit Pension Plan

**Q.2) Please inform the type of internal reports and/or financials you have available for us to do the audit. Would you be able to share any financials that you have (internally prepared)?**

**Ans:** There are no internally prepared financials. However, the documents referenced in Ans for Q.1 will be provided.

**Q.3) Reviewing the W-14 form and noted that it states the below. The threshold is for US \$250,000. This engagement will not exceed that threshold, so do we still need to complete the W-14 form? Please clarify.**

**Do not use Form W-14 if:**

**The payment is for any purpose other than for goods or services;**

**You are a U.S. person; instead, use Form W-9, Request for Taxpayer Identification Number and Certification;**

**The payment is for purchases or personal services under the simplified acquisitions procedures that do not exceed the simplified acquisition threshold as described in 48 CFR 2.101;**

**Ans:** Please refer to 52.229-11 Tax on Certain Foreign Procurements—Notice and Representation (JUN 2020)

